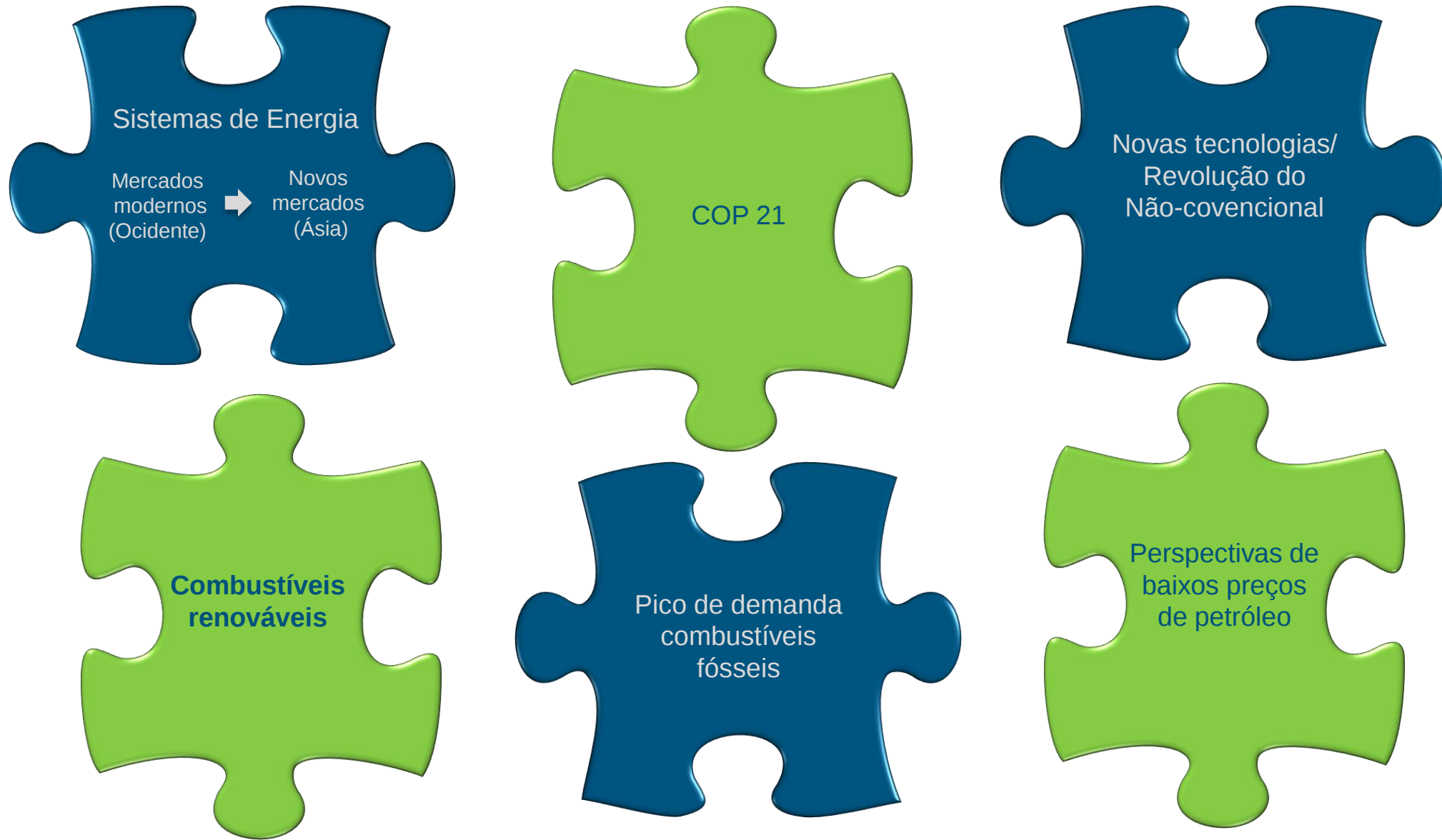




Perspecetivas da Indústria de Óleo e Gás no Brasil

Antonio Guimarães – Secretário Executivo de E&P

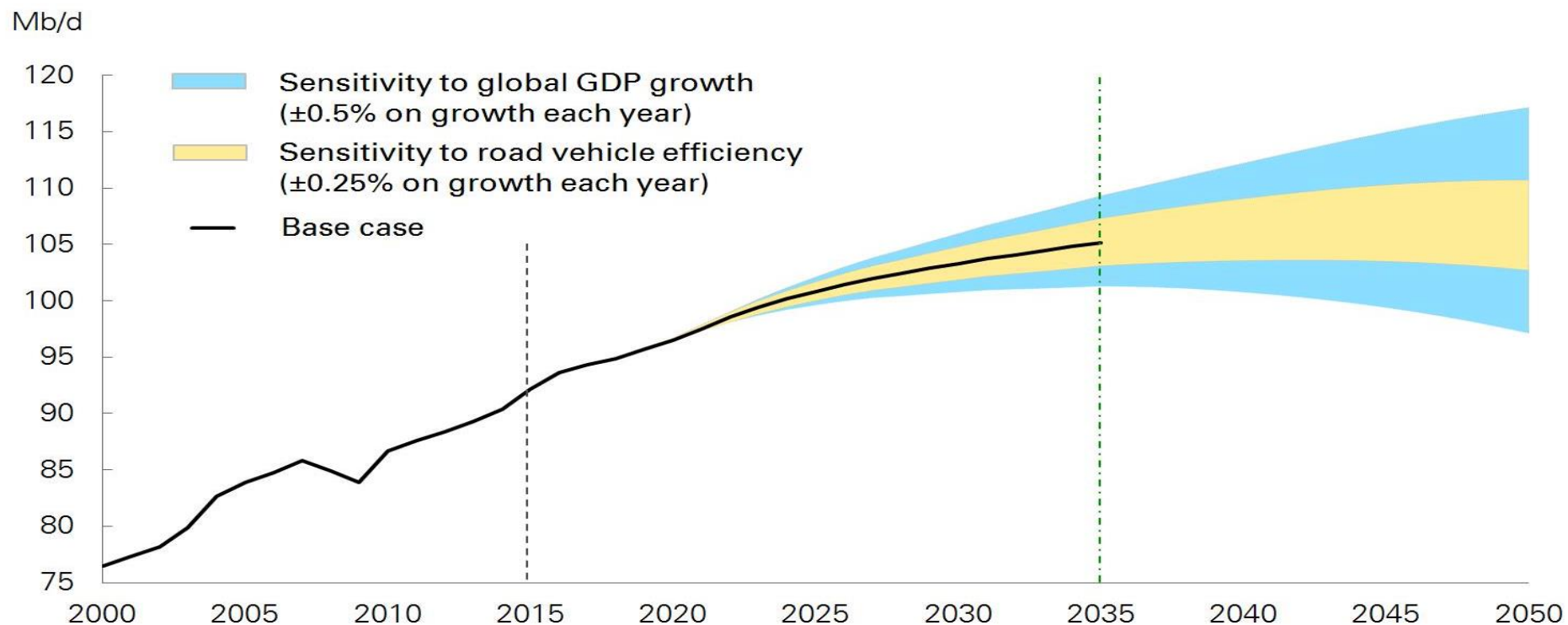
Ambiente Global em Mudança



Além de 2035: Pico da demanda?

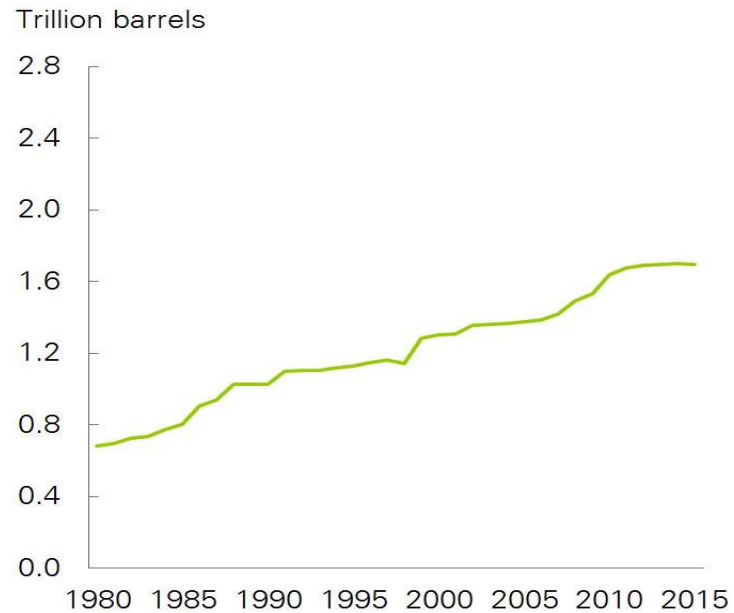
O ponto onde a demanda de óleo vai atingir o pico ...

Ilustração dos caminhos para a demanda de óleo sob diferentes pressuposições



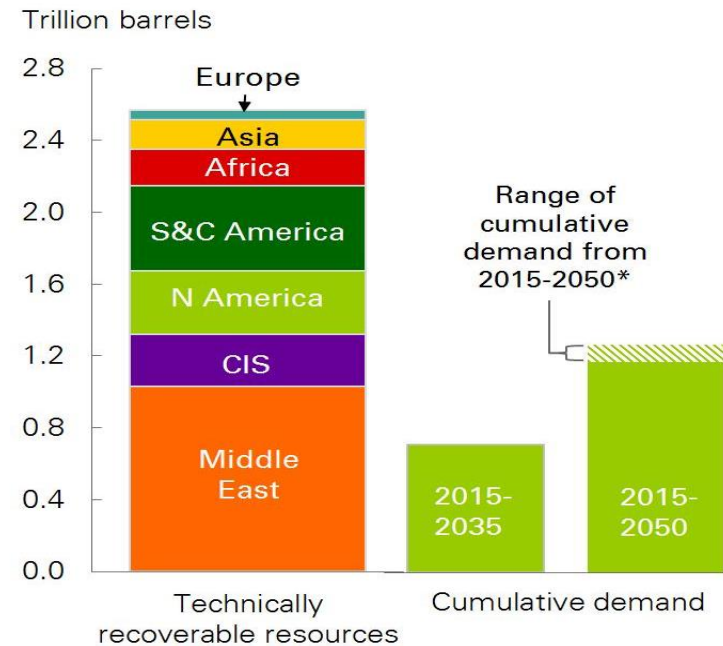
Reservas de óleo não são o limitante...

Reservas Globais provadas de óleo



2017 Energy Outlook

Estimativas de reservas tecnicamente recuperáveis e demanda acumulativa de óleo

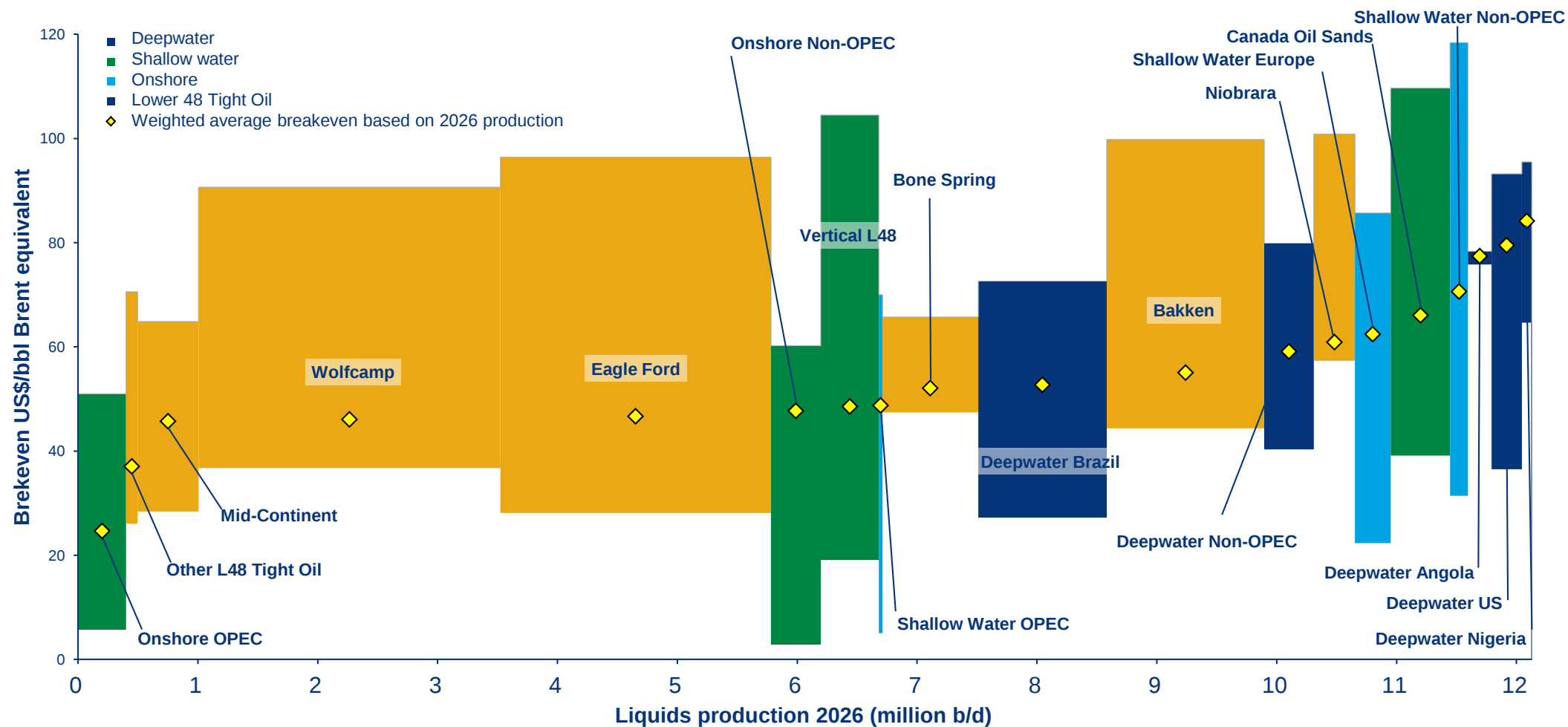


*Based on range of outcomes shown on page 88

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Oil&Gas Competitive Landscape

Pre-FID and US L48 future drilling cumulative production by breakeven in 2026 – by resource theme



High Wells Productivity at Pre-Salt

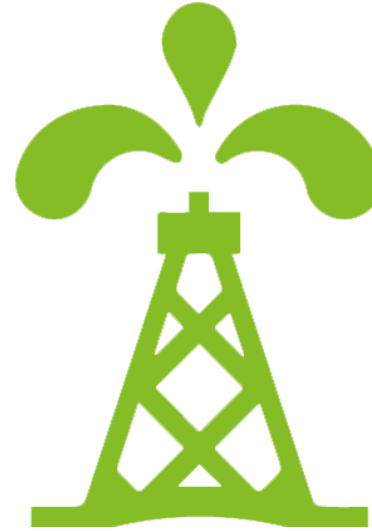
Average oil daily production:

01

Well at Lula field (offshore)

x40

Non-conventional wells at
U.S.
(onshore)



20 a 30

Thousand barrels/day
(Wells at Santos Basin)

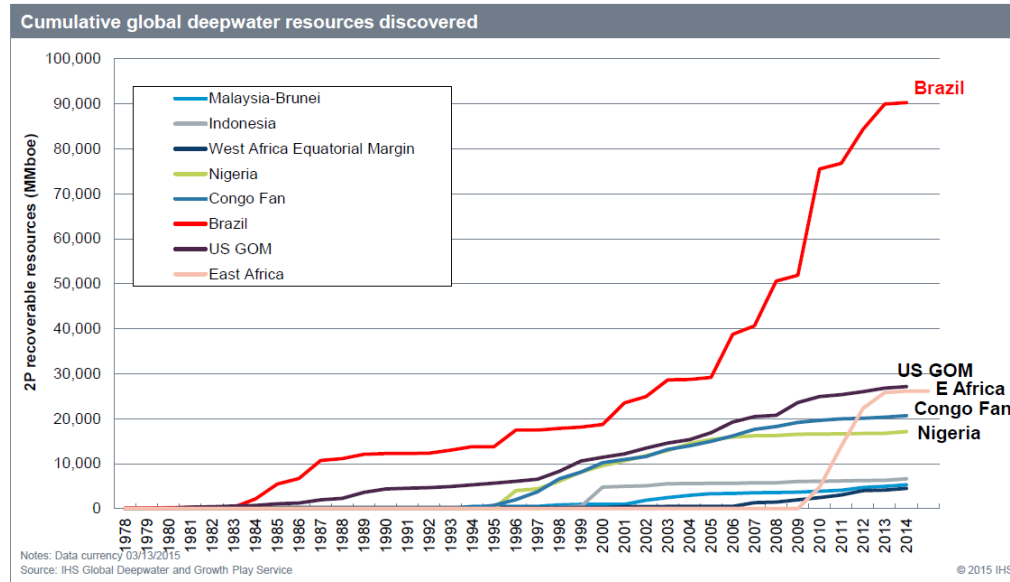
Other examples:

North Sea
~15.000 b/d

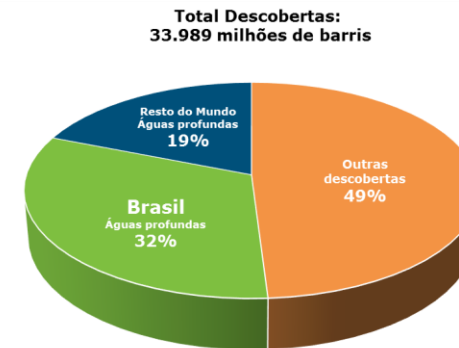
Gulf of Mexico
~ 10.000 b/d

Source: IBP with data from Petrobras e US EIA

Potencial Petrolífero Brasileiro é Grande...



- ✓ Entre 2005-2010 mais de 50% das descobertas do mundo foram em águas profundas. O Brasil correspondeu por 63% destas descobertas no período.
- ✓ O Brasil tem condições de dobrar a produção nacional de petróleo e concorrer com a OPEP no mercado internacional



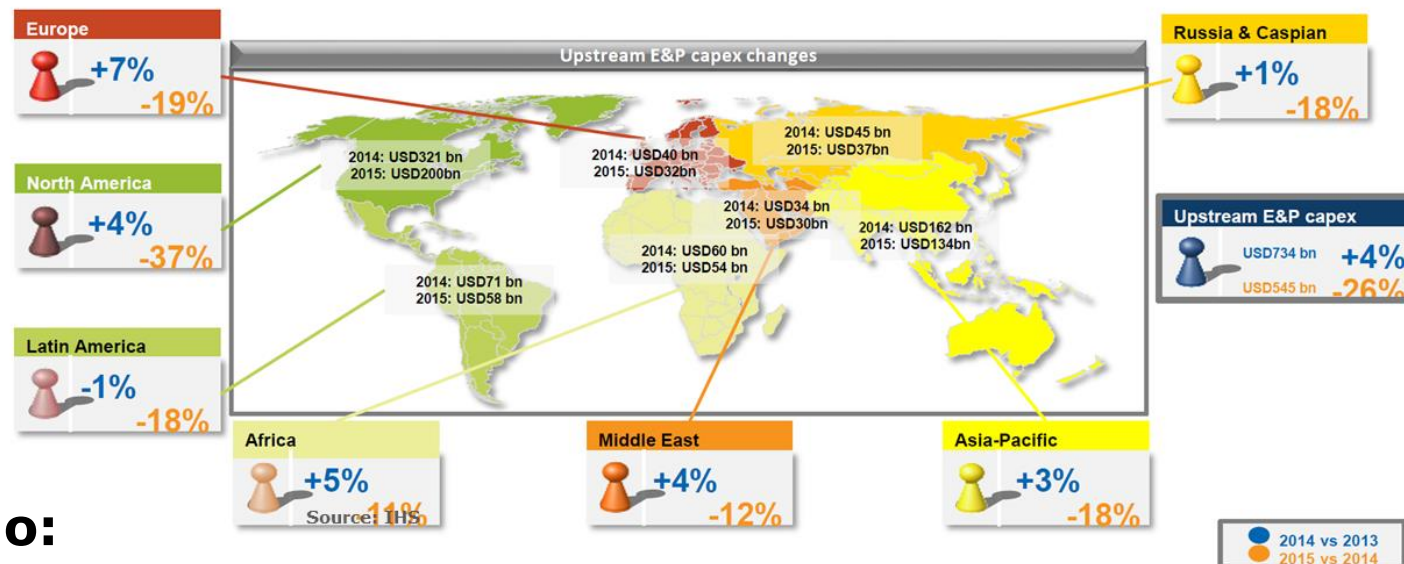
Fonte: Elaboração IBP com dados Petrobras (PNG 2012-2016)

Atualização - Janeiro 2016

Presalt oil
The world's largest oil discoveries in recent years are in Brazil's offshore, presalt basins.
(US EIA, DOE)

Competitividade do Setor no Brasil

Impactos da Crise nos Investimentos em E&P



Mundo:

\$ 734bi → \$ 545bi

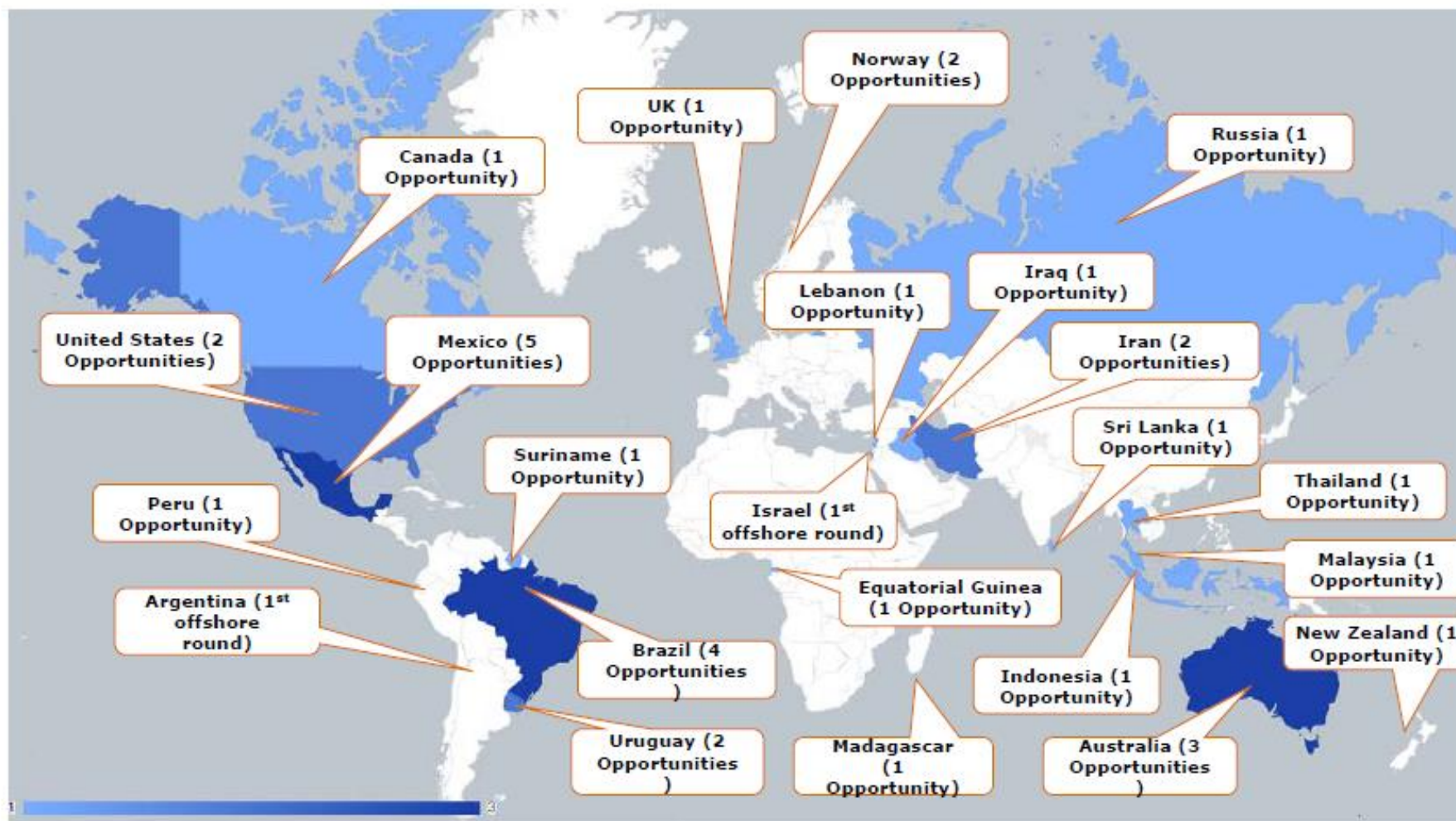
Brasil:

\$ 43bi → \$ 25bi

Participação: 5,85% → 4,59%

- ✓ Pelo seu potencial geológico o Brasil pode capturar entre 7% a 10% dos investimentos globais em E&P.

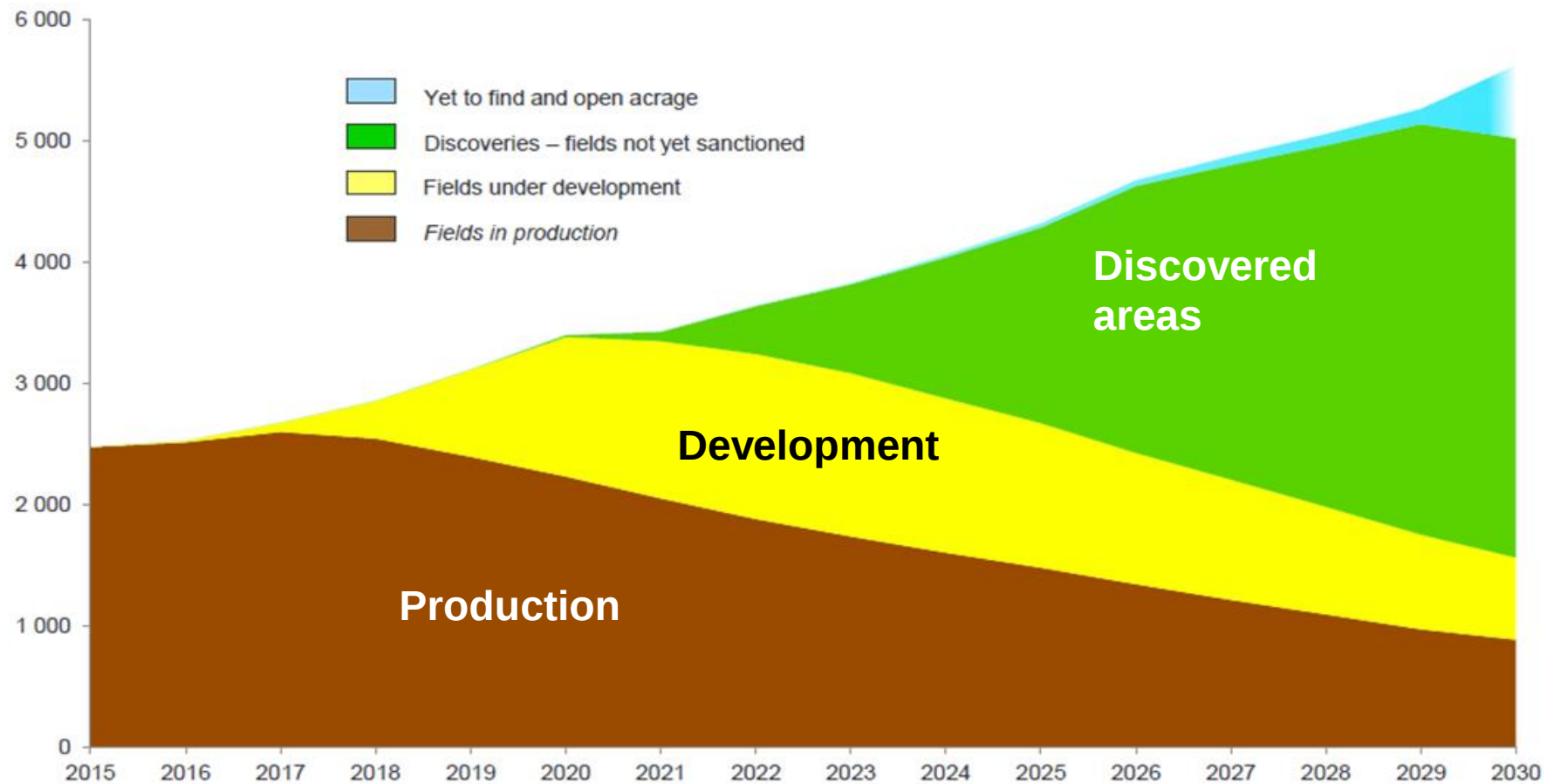
Calendário de Rodadas 2017



Source: IHS Market

Oil and Gas Market

Future Brazilian Production of Oil and NGL
(Million barrels day)



Source: UCube September 2016

Source: Rystad Energy (UCube Sept 2016)

Oportunidades do Setor no Brasil

Current production/reserves

Production (March, 2017)

Oil – 2.5 million bpd

Gas – 101 million m³/day

Proven Reserves (Dec, 2016)

Oil – 12.7 billion bbl

Gas – 378 billion m³

Expected potential (next 10 Bidding Rounds)

US\$ billions in new investments

+ 10 billion bbl of Recoverable Volumes

+ 300 offshore wells

+ Up to 20 drilling rigs working simultaneously

+ 17 new production units

+ 1,100 km of flowlines

+ 600 km of gas pipelines

+ 2 million bpd in 2027